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NEWSPAPER

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New promos fuel CBS-Kmart linkup

Network, retailer team for sample pack distribution timed to fall premiere week

By Joe Mandese

Contrary to reports that the CBS-Kmart marketing partnership is winding down, the No. 1 TV network and second-largest retailer are teaming up this fall for a new series of promotions that will run at least into 1994.

The effort, dubbed the "CBS/-Kmart Premiere Value Pack," will be the first product sampling program ever launched by a major TV network.

Separately, CBS and Kmart Corp. this week are expected to conclude a large advertising deal that's believed to be the first major upfront buy of the 1992-93 TV season.

CBS executives said the Kmart buy is a "multimillion-dollar" deal representing the retailer's biggest commitment ever to CBS. The network wouldn't comment further but, according to Arbitron Co.'s MediaWatch, in 1991 Kmart placed only 17.3% of its $55 million network TV budget on CBS. NBC received 46.9% and ABC 35.8%.

CBS' slim slice of Kmart's network TV budget was ironic, considering the two companies were then in the third year of their massive joint fall promotion. In the previous two years, CBS got slightly less than a third of Kmart's budget.

Recently, CBS shifted the focus of its fall promotion to a major effort tying in with Nabisco Biscuit Co. brands. The partnership fueled speculation that the relationship between CBS and Kmart was waning.

Under the program, 2 million sample packs will be distributed in Kmart stores.

Although Nabisco is the focal point of the promotion, Kmart's 2,300 stores will play a supporting role. The retailer will provide signage and in-store displays of the CBS/Nabisco promotion, dubbed "America's Favorites."

Nabisco and Planters LifeSavers Co. are also the first brands to sign on to the separate CBS/Kmart value pack sample promotion.

CBS executives declined to comment on the project. But in a joint letter sent to key promotion industry executives last week, CBS Senior VP-Marketing and Communications George Schweitzer and Kmart VP-Sales Promotion Dave Schuvie invited marketers to participate.

Under the program, 2 million sample packs will be distributed in Kmart stores. Kmart will promote the sample packs in-store and via its Sept. 13 circular,

(Continued on Page 51)

Half-hour Q&As to be Perot's main ad venue

By Steven W. Colford

Don't expect a traditional presidential campaign from Ross Perot.

You won't see long trips and speeches on the campaign trail or negative commercials on the nightly news. Instead, Mr. Perot plans a series of 30-minute, live question-and-answer TV programs. Airtime will be bought on network, cable or spot TV by Mr. Perot, whose personal fortune is calculated at about $3.3 billion, according to recent filings with the Federal Election Commission.

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Many expect the TV barrage to start soon after Mr. Perot formally announces his independent candidacy, probably in June.

The programs would emanate from Mr. Perot's own facilities and be satellite-fed to other venues, where audiences would be able to quiz the candidate on issues.

The sessions would likely offer a preview of how the Texan would use "electronic town hall meetings" to determine public sentiment if elected.

The technique would let Mr. Perot avoid

(Continued on Page 51)

Marketers aiming for Olympic slam-dunk

Basketball sponsors lay out $40M to hype involvement

By Julie Liesse

Marketers are jumping through hoops to promote the U.S. Olympic basketball team as frenzy builds for the debut of America's all-star team.

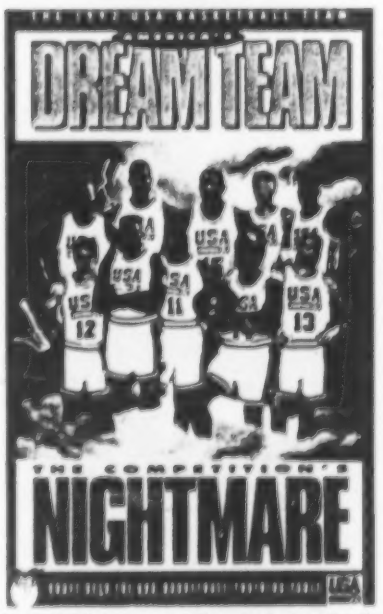
"Most of America hasn't yet seen [the marketing plans] we've seen. This will be the most concentrated marketing exposure any national governing board has ever received, for any sport," said Rick Welts, president of NBA Properties, the sponsorship and licensing agent for USA Basketball.

In the 2½ months before the Summer Olympics begin, the team's 13 official corporate sponsors, including Kraft USA, McDonald's Corp., Converse, Visa USA and Quaker Oats Co., will put up an estimated $40 million in media advertising hyping their involvement with USA Basketball, the national governing board for the sport and its Olympic connection.

That figure doesn't include unofficial Olympic marketing efforts by companies like Nike, which have contracts with individual Team USA members, and a substantial licensed merchandise program from 23 USA Basketball licensees.

"Usually with Olympic competition, names emerge

(Continued on Page 51)



Kraft USA is among the marketers backing the U.S. Olympic basketball team.

LAST MINUTE NEWS

Fitzpatrick may aid Bush

WASHINGTON—Sean Fitzpatrick, vice chairman of McCann-Erickson Worldwide, is back in the running for a spot on the Bush-Quayle campaign ad team. Earlier, Mr. Fitzpatrick took himself out of contention, citing the executive shuffle at General Motors, the account for which he's responsible. But now Martin Puris, director of the GOP media team, said he's talked to Mr. Fitzpatrick and hopes he comes aboard. On the Democratic side, Roy Spence, president of GSD&M, Austin, Texas, met last week with Arkansas Gov. Bill Clinton's advisers and is expected to help with ads for the Democratic front-runner. Mr. Spence was a member of Democrat Walter Mondale's 1984 presidential campaign ad team.

Ads show riot beating

LOS ANGELES—U.S. Senate candidate Gray Davis last week broke two 30-second spots featuring TV news footage of the beating of trucker Reginald Denny at the beginning of the Los Angeles riots. BAD Campaigns created the spots, in which Mr. Davis, the Democratic state controller, blames the riots on failed political

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Quayle slap to 'Murphy' leaves CBS crowing

Advertisers committed despite VP's remarks

By Joe Mandese

Dan Quayle's attack on "Murphy Brown" may make the red-hot CBS sitcom even hotter for advertisers.

CBS executives believe the publicity generated by the vice president's objection to depicting star Candice Bergen's character as an unwed mother will only provoke greater viewer and advertiser interest.

"Murphy Brown" finished the 1991-92 season with an 18.4 Nielsen rating, making it the third-highest-rated show on TV and one of the most in demand by advertisers.

With the cost of a 30-second commercial averaging more than $300,000, "Murphy Brown" is currently the most expensive series on CBS. High-demand episodes, including the season finale lambasted by Vice President Quayle, often fetch more than $400,000 per spot.

Advertisers contacted by *Advertising Age* said they hadn't heard complaints from consumers or conservative groups about their series sponsorship and said they had no plans to pull out. Some of the largest advertisers are Kellogg Co., Ford Motor Co. and Bristol-Myers Squibb Co.

"Our strategy will continue to be to find the kind of TV that meets our standards, is not offensive and attracts our target market," said Thomas Shaver, director-consumer marketing for Saturn Corp., a subsidiary of General Motors Corp. that also sponsors "Murphy Brown."

Mr. Shaver said the flap wouldn't hurt Saturn's sponsorship of the show and could even enhance it, noting, "The show will probably be the most watched show in the history of TV when it comes back."

"We will continue to evaluate advertising on 'Murphy Brown.' If it directly hits our target market, we will continue to advertise. Now that it is the most talked about show in the country thanks to Vice President Dan Quayle, I'm sure it will receive high marks in our evaluation," said a spokeswoman for Reebok International, one of the series' sponsors.

CBS thinks the publicity will provoke more interest in "Murphy Brown."

CBS will further exploit the publicity surrounding the controversial "labor" episode by repeating it on Labor Day, Sept. 7, one week before "Murphy Brown's" new season begins.

"The fact that it will be broadcast on Labor Day will not be lost on our audience. It will give us a great hook going into the season opener," said George Schweitzer, CBS senior VP-marketing and communications, who described the publicity as a "promotional dream."

The publicity was also an unexpected shot in the arm for US Sprint, the No. 3 long-distance telephone marketer. Candice Bergen is spokeswoman in ads via J. Walter Thompson USA, San Francisco.

Sprint dismissed any suggestion that Vice President Quayle's comments might have compromised Ms. Bergen's advertising role.

"Candice is Candice, and Murphy Brown is Murphy Brown —they're two separate identities. We're delighted with Candice as our spokesperson, and if anything we think last week's incident was more of an opportunity for us," said Jorge Rodriguez, Sprint's VP-advertising and marketing communications. Sprint is not a sponsor of "Murphy Brown."

Some advertiser pullout from the series, ironically, might benefit CBS, which has consistently oversold the show due to high demand.

Since January, "Murphy Brown" has had nearly 70 different brands as sponsors, most buying only a single commercial unit in the show, according to Arbitron Co.'s MediaWatch. □

Contributing to this story: Bradley Johnson, Julie Liesse, Ira Teinowitz, Kate Fitzgerald, Pat Sloan, Jennifer Lawrence and Raymond Serafin.

Yeltsin looks to West for PR help

By Betsy McKay

GLOBAL NEWS

MOSCOW—The government of Russian President Boris Yeltsin is looking to spruce up its image by using Western public relations techniques.

Dmitry Rurikov, an adviser to President Yeltsin on international affairs, said last week he's met in recent days with several candidates to discuss handling public relations for the government.

Mr. Rurikov said he expects the government to select an agency soon and confirmed he's talked to Young & Rubicam/Sovero, but he wouldn't elaborate.

The government wants to hire a PR agency to handle President Yeltsin's trips abroad and possibly to develop ways to sell its economic reform program at home, said Michael Adams, ceo-general director of Y&R/Sovero.

Mr. Adams met with Mr. Rurikov May 15.

"Governments have to sell their positions," Mr. Adams said, explaining that, if selected, Y&R/Sovero would act as "communications counsel" but wouldn't be involved in policymaking.

"They have to be out there talking up their position," Mr. Adams said.

The first assignment could be to help plan President Yeltsin's U.S. visit in June.

The Russian government has had trouble getting its message across to its people. Relying on dry and lengthy decrees to get the word out, government officials have never recognized the importance of communication or selling ideas such as the radical economic reform program implemented by First Deputy Prime Minister Yegor Gaidar.

As discontent over economic hardships grows, Sunday demonstrations calling for the government to resign have become a weekly event in Moscow. Last week, the former Communist members of the hard-line Russian Workers' Party collected signatures in downtown Moscow demanding President Yeltsin's resignation.

"Maybe what they need is the functional equivalent of the 'fireside chat,'" Mr. Adams said, stressing the importance of educating the public. □

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Malt liquor shows muscle despite weak ad support

Double-digit sales increase fails to budge big brewers

By Ira Teinowitz

Malt liquor may be controversial, but it has one thing the beer market doesn't—impressive sales growth.

While the overall beer market is up only slightly, grocery sales of malt liquor zoomed 23% compared to 4% for the whole beer category for the 52 weeks ended March 21, according to Nielsen Marketing Research.

Such growth usually prompts market leaders to increase their marketing budgets and introduce new brands. But because of the controversy over malt liquor—namely that it's targeted to low-income and minority consumers—the top brewers are strangely quiet in the category.

Anheuser-Busch has King Cobra malt liquor and Miller Brewing Co. has Magnum, but neither advertises the brands aggressively. They have marketed their non-alcoholic brews—O'Doul's and Sharp's, respectively—more heavily, yet the malt liquor category's 6.3 million-barrel volume is more than triple that for non-alcoholic brews.

Malt liquor "is not a priority," said Richard Strup, Miller VP-brand management.

Coors Brewing Co. has no malt liquor brand and says it has no plans to create one.

The top three brewers have ceded the field to smaller marketers, which haven't been shy about competing. S&P Co.'s Pabst Brewing Co., G. Heileman Brewing Co. and Stroh Brewery Co., and some even smaller players like McKenzie River Co., have their own brews and are launching new initiatives.

The controversy heated up last year with Heileman's plan to launch a stronger malt liquor called Colt 45 PowerMaster. It drew enough criticism from community organizations and scrutiny from the Bureau of Alcohol, Tobacco & Firearms that the launch was scrapped.

But Heileman this year is testing Colt 45 Premium, with less alcohol and—it hopes—less controversy than PowerMaster.

The smaller brewers deny critics' charges that they're creating products to lure blacks and Hispanics, arguing the malt liquor market already exists. While some brewers offer higher-strength versions to tap the "macho" image of some malt liquor drinkers, others see new brands as opportunities to reach beyond the traditional malt liquor clientele.

Hornell Brewing Co., maker of Crazy Horse malt liquor—target of the most recent controversy—claims its sales are in more upscale, non-traditional malt liquor segments.

S&P's Olde English "800" registered 30.8% growth to 1.7 million barrels in the 52-week period, according to *Impact*, an industry newsletter. That growth helped Olde English replace Heileman's Colt 45 as industry leader; this year, S&P launched Olde English "800" Genuine Draft.

Outdoor boards and two 60-second radio spots that broke April 17 in more than 20 markets are themed "One bad cat" and feature Olde English's tiger mascot. Asher/-Gould, Los Angeles, handles.

S&P declined to disclose spending but said it could double last year's $2.2 million budget on Olde English "800" to push the new brand.

S&P President Lutz Issleib said he expects a further 25% volume increase this year and calls the draft line a logical marketing move.

"We have become the leader the malt liquor category and h completed our packaging/dis bution for Olde English '800' w all popular sizes. We are ready strengthen our leadership throu line extension," he said.

Mr. Issleib said the draft m liquor offers taste possibilities previously available and Pa felt it needed to move to thw potential competitors.

"When the Pabst Brewing launches a new product, we d quickly and economically," said. "We don't pretend to h the marketing answers but rat rely on what our wholesalers retailers want or need."

Stroh, too, is launching Sch Malt Liquor Genuine Draft, a l extension for its No. 3 Schl malt liquor. Schlitz, which saw sales slip 11.8% 1.5 million barr last year, is us two 30-second spots to supp the launch in s markets. Burr Advertising, C cago, handles. extension is Stro third malt liqu under the Schlitz label. Stroh markets Schlitz Red Bull slightly higher-strength version

Last year, Heileman h claimed it was forced to lau higher-strength PowerMaster protect its leadership positi against upstart rivals includi McKenzie River's St. Ides.

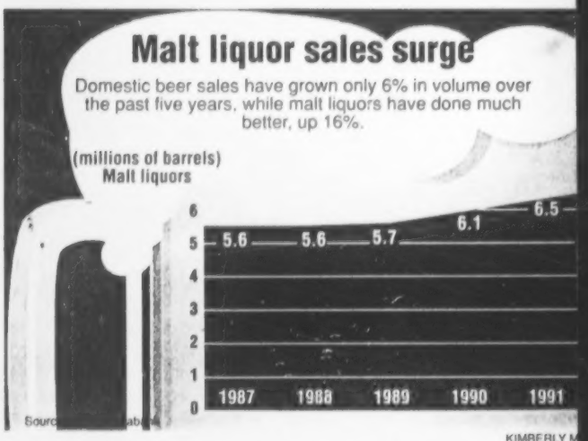
As for Colt 45 Premium, Hei man won't disclose the alcoh content but said it's less th PowerMaster, though reported slightly higher than regular C 45.

Colt 45 Premium is also a d ferent blend than PowerMast and Heileman said it's trying do the same thing as oth brewers—leverage its brands.

"It's the name of the game the industry," said Randy Smi Heileman corporate counsel. you look at any brand name, th are line extensions."

Colt 45 last year saw sales dr 11.1% to 1.6 million barrels f the main brand. Colt 45 also ha dry version. □

The top three brewers have ceded the field to smaller marketers.



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Whiskey marketers join to boost sales in Japan

By David Kilburn

TOKYO—Suntory, Nikka Whisky and Kirin Seagram are banding together to turn around the troubled whiskey industry in Japan.

Total whiskey consumption fell 2.7% in 1991 to 208,000 kiloliters, according to the national tax agency. It was the third consecutive year of falling sales.

The trouble began in 1989, when a 3% consumption tax was introduced and tariffs were reformed. The tax system for spirits is now based on volume and alcohol content, effectively lowering the prices for many premium whiskies while increasing the prices of cheaper brands. At the same time, whiskey marketers also cut back ad spending.

But now, in an unusual move, the three leading whiskey marketers have pooled resources to mount an estimated $262,000 joint ad campaign to boost sales.

"We think the market has bottomed out now," said a Suntory spokesman. "We're hopeful that sales will start to recover."

Suntory is Japan's largest distiller, with an estimated 70% of the whiskey market.

"It's unusual for Japanese firms to cooperate in this way. We are usually so competitive with each other that it's strange to work together," the spokesman said.

Dentsu "came to us with a proposal," said a spokesman for Nikka Whisky. "We liked the idea, and so we all went ahead."

According to Dentsu statistics, whiskey advertising in 1991 totaled $109 million, down 39% from 1989.

Last year, whiskey advertising accounted for only 12% of alcohol advertising, compared with almost 19% in 1989.

The new campaign, running in April, May and June issues of youth-oriented magazines, tells the story of whiskey, including how it's made.

The three major whiskey marketers in Japan are running a joint ad campaign in youth-oriented magazines.

"The joint campaign aims to try and boost consumption of whiskey, especially among younger age groups," said a Kirin Seagram spokesman.

"There's been a lack of investment in whiskey advertising and marketing, while there's been a lot of product innovation and competition within the beer market. So younger people . . . don't know as much about whiskey as they do about beer. We're trying to remedy this," the Kirin Seagram spokesman said.

The nine-page ad is running in four magazines popular with readers in their 20s, *Dime*, *Bart*, *Mambo* and *Cadet*.

The distillers are also using new products to lure drinkers.

Last June, Suntory began selling Smokey & Co., a whiskey for young people that uses drawings of a comical dog on its label and in ads.

"Like Smokey the dog, who stands surrounded by his pal dogs, we want people to enjoy drinking the whiskey in a rowdy mood with their friends," say TV and magazine ads by Hakuhodo.

"Smokey's been doing well," the Suntory spokesman said. "We sold 150,000 cases last year, which is what we projected."

One of Smokey's innovations is a mint-flavor whiskey, which has proved the best-selling flavor. Other flavors are Smokey and Natural Mellow.

Suntory has also introduced two new brands that aren't advertised and are available in limited quantities, for summer and winter gift-giving.

Another, Shirokaku, launched in May and handled by Dentsu, is designed to be mixed with water and drunk with food, like wine or beer.

"With Shirokaku, we are trying to stimulate the 'whiskey and water' market," the Suntory spokesman said. Whiskey and water is the traditional way to drink whiskey in Japan.

Last October, Kirin Seagram introduced Hips, a blend of bourbon and grain whiskies, targeted at people in their 20s and 30s. The label depicts an alligator, symbolizing man's primitive instincts, and the product name was selected to convey a hip image. Ads by Hakuhodo show moody, independent young people drinking out of doors.

"We want to change the image of whiskey from something that you drink quietly to a brighter image of something that you drink outside," the Kirin Seagram spokesman said.

In February, Nikka Whisky introduced Hi-Pak, a blended whiskey packaged in paper containers, targeting adults age 30 and up.

TV commercials from Dentsu, Young & Rubicam show a young wife skipping home with a carton of Hi-Pak.

Lightweight paper containers will encourage people to buy the drink to have at home, increasing consumption, the company said. □

Southern Europe ad spending spree hitting the skids

By John Pollack

MADRID—Ad spending in southern Europe, once booming, seems to be growing slowly but continues to outpace spending by northern neighbors.

In Spain, for instance, ad spending grew 3.9% in 1991, a sharp drop from the 10.2% rise in 1990, according to Nielsen/-Repress. This year, spending levels could drop even more, said Nielsen Repress Director Javier Munoz-Delgado.

Despite the slowdown, marketer and agency executives say they're optimistic about southern European markets in the future.

"Southern Europe is going to [continue to] follow a path of faster growth than northern Europe," said Stanley Bendelac, president of Grupo BSB, Madrid, and vice chairman of BSB Europe. Spain is "still among the most vital in Europe."

Other ad industry executives are also optimistic about Spain, predicting growth between 10% and 20% in real terms.

In Greece, the outlook is brighter after a booming first quarter.

Greek spending may soar as much as 25%, said Peter Economides, general manager of McCann-Erickson Hellas, Athens. Nevertheless, this would still fall short of 1991's 30%.

Other industry executives, however, believe this year's hike may even surpass last year's.

In Italy, a 3.4% increase is expected this year, Italian Advertisers Association says, compared to 1.2% in 1991. Next year, the association predicts 4.2% growth.

By contrast, Scandinavia and the U.K. have been declining for several years and German growth has begun to slow, said Jeff Fettig, Philips Whirlpool VP-European marketing.

"We continue to see good growth in Portugal, Spain and Italy, particularly in low-saturation product areas like dishwashers, microwaves and air conditioners," Mr. Fettig said.

Philips Iberica projects a 7% or 8% increase in its 1992 ad budget and a similar increase in 1993, said Rafael Vega, director of marketing communications.

Spanish automobile marketer SEAT expects to spend about $60 million in Spain in 1992, roughly equal to 1991 levels, said

"We continue to see good growth in Portugal, Spain and Italy."

Jose Antonio Ferreiro, SEAT's domestic advertising director.

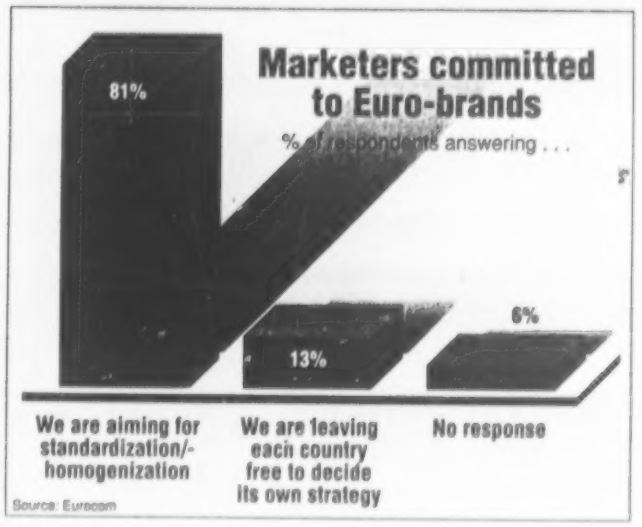
But this lack of growth reflects SEAT's high 1991 budget, inflated by the launch of the Toledo sedan, Mr. Ferreiro said. Total SEAT spending worldwide will probably rise about 15% in 1993, company officials said.

In Greece, multinational advertisers such as Lever Hellas, Procter & Gamble Co. and Sopral (Nestle) have on average doubled their spending since 1988. As they battle for a share of Greeks' decreasing aggregate disposable income, foreign and domestic companies are investing more and more in advertising, Mr. Economides said. □

Anna Carugati in Milan and Carol Reed in Athens contributed to this story.

INTERNATIONAL ACCOUNTS IN REVIEW

COUNTRY/BUDGET	CLIENT BRANDS	CONTENDERS	INCUMBENT	DECISION DATE
Italy: $45 million	**Alfa Romeo**	Conquest Europe; BBDO; others	Conquest Europe; BBDO	Unknown
Canada: $42 million	**Labatt Breweries**	J. Walter Thompson; D'Arcy Masius Benton & Bowles; Young & Rubicam; Bozell Palmer Bonner; Palm Publicite; Publitel	Scali, McCabe, Sloves	Fall 1993
Malaysia: $19 million	**Malaysia Airlines**	Incumbent; J. Walter Thompson; Union Forty-Five; Backer Spielvogel Bates; Ball Partnership; Bozell; Naga DDB Needham DIK; Asatsu & Fortecomm; Lintas Malaysia; Mutiara McCann; Dentsu, Young & Rubicam	AMC-Melewar Zecha	October
U.K.: $16 million	**Mercedes-Benz U.K.**	Incumbent and others	Robert Jenkins Advertising	Unknown
Germany: $15 million	**BHW Bausparkassen lending institution**	Unknown	Euro RSCG	Early June
U.K. $14 million	**British Rail InterCity**	BMP DDB Needham; SPCTD Lintas; CDP & Partners; Leagas Delaney	Saatchi & Saatchi Advertising U.K.	Unknown
Australia: $12 million	**AMP Society Insurance**	McCann-Erickson; Foote, Cone & Belding; DMB&B Weekes Morris Osborn	George Patterson	June
U.K.: $9 million	**Honda U.K.**	Incumbent and others	Butterfield Day Devito Hockney	Unknown
Germany: $7 million	**SAT.1 TV station**	Incumbent, Baums, Mang & Zimmermann; Trust; Tostmann, Domann, Holzwarth	von Mannstein	May
Germany: $7 million	**Treuhandanstalt government privatization unit**	Krakow-McCann-Erickson; Lintas Hamburg; Scholz & Friends; ABC/Eurocom	New account	Late May
Germany: $6 million	**Defense Ministry**	Lintas; MWI FCB/Publicis; ABC/Eurocom; Krakow-McCann-Erickson; Kommunikation Volker Stoltz; Spiess Ermisch Abels	New account	June
Australia: $4 million	**Australian Army Recruitment**	Young & Rubicam; Leo Burnett Connaghan & May; J. Walter Thompson	Marketforce	Late May/early June
Australia: $4 million	**Thomas Cook retail travel/foreign exchange**	Unknown	Leo Burnett Connaghan & May	Unknown
Germany: $3 million	**Erco Leuchten lighting company**	Incumbent, Knopf, Naegeli, Schnakenberg; Spiess Ermisch Abels	Hildmann, Simon, Rempen & Schmitz/SMS	Late May
Australia: $3 million	**Mazda Eunos luxury car**	Box Emery & Partners; SSB Advertising; Grey Advertising, Luscombe & Partners; Moffatt Sharp	New account	May
France: $3 million	**Naf Naf clothing**	Incumbent; Eurocom; Foote Cone & Belding; Providence; DDB Needham	Image Force	Unknown
Australia: $3 million	**National AIDS Education Campaign**	Incumbent; SSB Advertising; John Bevins; Ogilvy; Schofield & Smith; Sherbon Greenlaw	Magnus Nankervis & Curl	May



John Hall

Who favors branding with 'Euro' approach

By Bruce Crumley

PARIS—German, U.K. and U.S. marketers are the most likely to favor a standardized brand approach to Europe, a Eurocom study found.

Standardization, the use of the same product and brand name across Europe, is favored most by the Germans (96%) and British (95%). This compares to about 77% of U.S. respondents, 69% of the French and 60% of Italians.

More than 200 European brand managers in 13 countries responded to surveys the agency mailed out. Results were obtained by interview and questionnaire between June 1991 and last February.

"The strongest brands are what we call tacticians—they have a centralized strategy that allows for autonomy on the local level," said Edward Sharp, Eurocom's international development director, who oversaw the study.

"The weakest brands are the beginners: Those are just starting to consolidate brands around Europe," he said.

A bit more advanced are the centralists, imposing a single, unbendable strategy from the home market for consolidated brands. Then, there are the adaptors, which "are forced into making different changes in different markets for a variety of reasons, most typically distribution," Mr. Sharp said.

"The strongest brands are what we call tacticians—they have a centralized strategy that allows for autonomy on the local level. The weakest brands are the beginners: Those are just starting to consolidate brands around Europe."

"What companies gradually realize is that taking globalization head-on and trying to make the same thing work uniformly everywhere does not work," he added.

While the study found 81% of companies want a standardized Euro-brand marketing strategy, most have a lot of work to do. Twenty-four percent said they'd only begun the process; 58% said a plan was well developed but still had a long way to go; and only 15.5% said their European strategy was completely implemented. The remaining 2.5% didn't respond.

Assessing those strategies, 46% said their approach needs improving, 45% said it's quite good and just 9% described their current efforts as excellent.

Respondents describing their strategies as good were involved in luxury items, cars, services and video/stereo equipment. Sixty-seven percent of food and confectionery companies chose the lowest success rating, saying their strategies "need improving."

Since some of Europe's strongest companies—such as Groupe BSN, Nestle and Grand Metropolitan—have recently gone through a growth period by acquisition, it's to be expected that they're late in getting things centralized, he said.

"Nestle has many brands, drinks for example, that are marketed by 'tacticians,' but its confectionery brands are really 'beginners,' " he said.

Explaining why U.S. companies could be successful in marketing Euro-brands, Mr. Sharp said, "Take Kraft products, Procter products or some of the soft drinks. These are companies that have been marketing their products as global products of American origin for years and years. They began treating the world as a global market before it occurred to anyone else . . . They also tended to treat Europe as a European market before European companies did."

Regarding ad agency relationships, 48% of respondents said they work with an international network agency and 17% said they use agencies affiliated with international groups. The rest work with local shops. □

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Publisher Springer rebuilds flagship paper

By Kevin Cote

BERLIN—Slumping German publisher Axel Springer Verlag is working hard to rejuvenate its prestigious national daily *Die Welt* and revitalize other publications in Europe.

On the heels of deep corporate cost-cutting measures, the publisher will try to boost *Die Welt's* falling circulation by redesigning and editorially revamping the publication. Circulation fell 5.9% in one year, to 212,436 at the end of March.

Springer is taking drastic measures to restore corporate earnings after failing to pay shareholders a dividend last year, the first time in the company's 46-year history. After-tax profits in the first half of 1991 plummeted by 58% to $15 million from $36 million in the first six months of 1990.

The company lost $42 million in its failed *Claro* daily tabloid venture in Spain. The paper published for four months before Springer closed it down last August. Springer has also suffered from increased competition in eastern Germany since the Berlin Wall fell in 1989.

"*Die Welt* needs to modernize," said Runhild Reinecke-Hipp, media director at TBWA, Frankfurt. "More investment is needed in editorial, design and print quality to attract the readers."

Springer executives say *Die Welt* won't be a German version of Gannett Co.'s *USA Today*, as widely speculated, but will borrow some design elements of contemporary newspapers.

"We're not going to reinvent the newspaper," the company said.

Various formulas for *Die Welt* have been discussed, and the primary changes will be visual, a company executive said.

McCann-Erickson, Hamburg, which handles advertising for at least one other Springer paper, has been invited to pitch for *Die Welt's* relaunch, an agency executive said. The paper currently has no agency of record.

GLOBAL MEDIA WORKS

Springer's preoccupation with *Die Welt* follows a recommendation from Munich-based consultancy Roland Berger & Partner to cut costs and restructure. Springer's board is wiping out 1,400 jobs, reducing employees 10% to 12,620 by the end of 1993. That reportedly will save nearly $100 million a year.

Despite the problems, Springer remains active and is even expanding in Europe. The publisher is redesigning and revising the editorial concept of its Austrian daily *Tiroler Tageszeitung* to include more local reporting from western Austria. In addition, Springer is seeking partners in Portugal, Greece and Denmark for its *Auto Bild* automotive newspaper.

Success in foreign markets will become more important now that Springer's *Bild* national downmarket tabloid is also under siege in Germany. With a daily circulation of 4.45 million, *Bild* remains the nation's largest newspaper, though circulation is down 11% from last year and German reunification has radically altered its competitive situation.

Opportunities in Germany's eastern states put large German magazine publishers Burda and Gruner & Jahr into the newspaper business, and they're squeezing the Springer daily press empire in Berlin.

The splashy *Super* tabloid, launched last year in eastern Germany as a joint venture between Burda and Rupert Murdoch's News International, is estimated to be selling 400,000 copies daily. On May 4, *Super* introduced a Berlin edition, directly competing with Springer's Berlin tabloid *B.Z. B.Z.'s* daily circulation is already down 8% from last year to 337,469.

And Gruner & Jahr's *Berliner Zeitung*, a midmarket daily formerly published only in East Berlin, is selling 274,179 copies daily throughout the united city. That's contributed to the circulation loss of 5% at *Berliner Morgenpost*, another Springer paper in Berlin selling at 222,434 copies daily. □

European theaters just the ticket for ads

By Janice Kelly

Although the number of theaters has decreased throughout Europe, cinema ad spending has increased, Carat says.

As of last year, there were 26,321 movie screens in Europe, a 48% decline from 1960. Of the total screens, 73.4% accepted advertising, the Paris-based media planning and buying specialist reported.

However, the size of the cinema ad market last year was estimated by Carat at $459 million, up 7% from a year earlier. By 1993, cinema ad spending will reach $550 million, Carat predicted, based on buying analyses.

"Cinema advertising may not draw a mass market like television, but it does deliver a captive audience and therefore has much greater levels of impact and awareness than other media," said Christopher Biggs, London-based Carat communication manager.

The force behind the increase in ad spending was the arrival of multiplex cinemas in the mid-1980s.

"Multiplex cinemas have had an effect in re-establishing the cinema as an 'entertainment experience,' where young groups can go to the cinema to have a meal or go bowling without leaving the venue," said the Cinema Advertising Association, a trade group that promotes, monitors and maintains standards of cinema ads.

Cinema advertising in the U.K. totaled $58 million last year, up 3.2% from 1990, Carat reported.

In Spain, cinema ad revenue was $76.6 million, up 33.4%, due in part to the country's fast-paced economic growth. By contrast, Belgium's cinema ad revenue took a 23.2% nose dive to $11.9 million last year.

Mr. Biggs cited the influx of cable in the country. "Over 95% of households have cable, giving them access to 25 channels," he said.

Among the 16 main European cinema markets, Germany had the highest total with $158.5 million in ad spending. That represented a 5.2% increase from a year earlier.

Cinema advertising, typically featuring soft drinks, jeans, alcohol and car ads, makes up 1.3% of the European advertising market, Carat said. □

Will 'Asia, Inc.' click?

Why new business title thinks it will beat the odds

By Andrew Geddes

HONG KONG—Asia's newest business magazine, *Asia, Inc.*, faces an uphill battle to establish itself in a crowded, competitive market.

In the past two years alone, two other pan-Asian business magazines, *Billion* and *Far East Business*, have folded, citing cost overruns and the difficulty in developing a subscriber base. Existing international and regional English-language titles, such as *Newsweek International, Far Eastern Economic Review, Time* and *Asia Week*, already have well-established readerships.

But *Asia, Inc.* Managing Director and Publisher Peter Kennedy said the English-language monthly launching in July will succeed.

"We can keep our costs down," he said, refusing to disclose how much money is being spent on the magazine. He noted publisher Manager International owns the printing facilities in Thailand where the magazine will be printed and has an extensive in-house telemarketing operation.

Asia, Inc. will develop its base by mailing three free issues to 100,000 potential subscribers, most of whom are in Hong Kong and Singapore. Rate for a color page is $7,000, based on 40,000 circulation. Cover price is $4.50.

"We don't want to take readership from anybody. I think we will find a lot of readers who have not been in the marketplace, who see the current crop of magazines as too boring, too dull," Mr. Kennedy said.

Asia, Inc. has entered a market crowded with competitors.

"I think in the future there is no question we will be looking to employ an ad agency," he said. "They will advise us on communications strategies."

For now, *Asia, Inc.* has a modest promotional budget with most funds directed at trade promotions in publishing industry magazines, he said.

Mr. Kennedy has held discussions with publishers outside Asia about offering advertisers cross-media deals.

"You have to form alliances. It is possible that some magazines we compete with in some markets, we will cooperate with in others," he said. No such deals will be concluded until next year, he added.

"Our priority is to develop our readership franchise, not our advertising franchise," Mr. Kennedy said.

Still, *Asia, Inc.* will have to prove itself if it's to secure a share of regional ad budgets.

"I find it hard to see where it will fill a gap," said Maggie Choi, Backer Spielvogel Bates Worldwide media director.

"We welcome the launch of new titles, but we're telling our clients to wait and read the issue before committing," she said. "It's not a market where we don't have choices."

Asia, Inc. is the latest in a string of investments by Bangkok-based Manager International, controlled by Sondhi Limthongkul, Manager's editor in chief and publisher.

Last year, Manager, which also has three Thai-language publications and two other English-language magazines, spent $4 million to $5 million to buy every-other-weekly *Buzz* in Los Angeles. □

News briefs on print, electronic and alternative media.

Vanity Fair has identity crisis. Jonathan Newhouse, Paris-based chairman of Conde Nast International, blasted the U.K.'s Periodical Publishers Association this month for disqualifying the British edition of *Vanity Fair* from the association's annual awards, claiming the magazine is really American. Mr. Newhouse told an audience at the association's 1992 conference in London May 5 that the year-old British edition, which carries the same editorial as U.S. *Vanity Fair*, has a U.K. circulation of 63,000 and has run nearly 500 U.K. ad pages.

"It is published by a British company, printed and distributed in the U.K., marketed to British advertisers and edited by an international staff headed by Tina Brown," Mr. Newhouse said. "Because [Editor Tina Brown's] desk is physically located in New York, for the PPA that outweighed other factors."

Association rules forced the exclusion of *Vanity Fair*, said Neil McRae, association chairman and managing director of *Reader's Digest* in the U.K.

Buyers tune in U.K. channel. An ever-changing group of media entrepreneurs are preparing bids, due July 7 to the Independent Television Commission, for the U.K.'s fifth terrestrial TV channel. Several consortiums already exist, but possible mergers are being mentioned to avoid a costly bidding war.

Among those planning to bid are Time Warner, Canadian media owner Conrad Black and his U.K. Daily Telegraph Group and TV presenter David Frost. Start-up costs for Channel 5, due to go on air by 1995, are estimated at $360 million. □

Publishers optimistic as ad pages increase

Large magazines benefit most from the turnaround

By Scott Donaton

The minus signs are slowly turning to pluses for magazine publishers.

MEDIA WORKS

April ad pages hit 14,871.6, up 3.1% from last year, according to Publishers Information Bureau. The gain left year-to-date pages at 50,708.7, down just 1% from the same period in 1991.

If the trend continues, 1992 will be an up year for an industry that earlier predicted flat performance at best.

The rebound continues to be led by the larger magazines that had been hardest hit by the downturn. Sixteen of the top 20 magazines saw ad page gains through April, while just 49 of the top 100 could make the same claim.

Although ad revenues are considered a less accurate reflection of a magazine's health, those figures too are strong. Revenues rose 10.9% to $642 million in April, the first double-digit revenue increase since December 1989. For the first four months, revenues totaled $2.1 billion, a 4.2% gain.

While several publishers said they're encouraged by the gains, they pointed out that 1991 was extremely soft and they're still a long way from pre-recession levels.

But monthly magazine publishers said the positive signs are continuing into the third quarter, yet another sign a real recovery is under way.

"Our second quarter was up, [and] it looks like the third quarter will be up also," said *Glamour* Publisher Jack Kliger. "Anyone who thinks it's going to go back to the way it was 10 years ago is crazy."

Magazines registering gains spanned a variety of categories; among those still in a slump, women's monthlies dominate the list.

On the strength of a 100th anniversary April issue that carried 380 ad pages—a gain of 64.2% over the same issue last year—*Vogue* was up 2.4% through April with 906.3 ad pages.

But for most others in the fashion, beauty and service fields, the road is downhill.

Cosmopolitan, Good Housekeeping, Elle, Glamour, Parents, Ladies' Home Journal, Better Homes & Gardens, Mademoiselle, Redbook, Seventeen, Harper's Bazaar, Self, Mirabella, New Woman, Working Woman, HG, Working Mother, Lear's and *Victoria* all saw ad pages drop for the first four months.

On the plus side were *Family Circle, Woman's Day, Country Living, McCall's, Parenting, Shape, House Beautiful* and *Child*.

One reason for the continued slump is weakness in the toiletries and cosmetics category, where ad revenues fell 5% through April to $191.7 million.

Another weak category is automotive enthusiast magazines, one of the few bright spots during most of the recession.

Car & Driver carried 350.4 pages through April, a 13.3% decline; *Road & Track's* 313.9 pages were down 7.8%; *Automobile's* 250.6 pages marked a 2.7% drop; and *Motor Trend's* 240.3 pages fell 13.4%.

Ironically, the automotive category is one of the strongest performers for magazines this year. Automotive ad revenues were up 9.2% to $320.7 million through April, according to PIB.

Magazines targeting blacks are among the categories showing gains this year. *Black Enterprise* saw its pages rise 19.7% to 306.4 through April. *Essence* carried 236.7 pages for the period, up 3.2%, while *Jet* was flat with 335.5 pages, a 0.3% increase. □

Top 10 magazine ad categories by revenue

Category	1992 revenue	% chg	1992 pages	% chg
Automotive*	$320,684,385	9.16	5,577.9	5.65
Direct response cos.	$202,462,540	2.47	6,326.7	-2.11
Toiletries	$191,745,601	-4.96	3,837.8	-9.08
Apparel**	$152,584,271	7.84	5,127.8	-2.80
Food	$148,598,015	1.06	2,116.9	-12.11
Business & consumer svcs.	$147,347,514	24.80	4,018.6	18.79
Travel, hotels & resorts	$139,365,438	7.35	4,124.8	-0.93
Computers & office equip.	$95,253,999	18.39	1,847.3	6.69
Drugs	$69,435,005	34.29	1,305.7	18.47
Cigarettes & tobacco	$66,301,455	-28.12	1,015.4	-30.08

Revenue and page figures are from January April 1992. *Includes accessories and equipment. **Includes footwear and accessories. Source: Publishers Information Bureau

Magazine ad page leaders

Publishers Information Bureau figures for January through April 1992.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's & Your New Home	1,270.21	1.5	24,077,209	4.1
2	Business Week	1,065.15	12.0	63,633,546	12.9
3	Modern Bride	1,041.81	3.4	18,546,498	11.9
4	Forbes	977.92	6.3	45,350,265	9.1
5	Vogue	906.26	2.4	37,565,444	5.4
6	The Economist	887.33	20.7	9,785,847	42.4
7	People	865.07	-9.8	95,349,828	-4.3
8	TV Guide	804.52	-3.3	89,717,049	-8.5
9	Fortune	728.16	3.3	39,325,683	8.1
10	Entrepreneur	727.98	3.5	8,972,296	19.0
11	Sports Illustrated	699.87	3.5	96,809,532	6.1
12	Golf World	691.99	12.2	6,482,883	21.4
13	New York Magazine	676.10	1.4	12,150,861	8.0
14	Bridal Guide	633.30	12.7	6,270,254	58.3
15	Time	619.56	-5.6	101,786,904	3.9
16	Newsweek	598.24	13.0	72,003,141	14.6
17	Cosmopolitan	587.17	-5.7	40,614,418	1.3
18	U.S. News & World Report	565.25	9.3	51,183,236	18.3
19	The New Yorker	535.79	8.7	15,665,583	11.2
20	Family Circle	528.42	2.6	48,613,874	10.1
21	American Way	527.42	13.2	7,689,546	9.2
22	Yachting	515.67	10.2	3,561,453	18.1
23	Good Housekeeping	510.19	-3.2	55,604,122	2.2
24	Elle	490.06	-11.5	17,159,264	-4.7
25	Golf Digest	486.47	21.3	28,312,280	19.9
26	Muscle & Fitness	475.90	-0.7	9,064,444	3.9
27	Glamour	469.75	-17.3	27,039,060	-11.2
28	Rolling Stone	460.99	-5.2	19,967,720	3.2
29	Woman's Day	451.60	46.8	36,727,102	56.2
30	Golf Magazine	445.96	-4.1	16,432,924	-0.3
31	Parents	431.85	-3.0	20,224,558	2.5
32	Vanity Fair	424.42	12.8	17,313,523	34.2
33	Ladies' Home Journal	421.89	-15.2	33,994,385	-10.0
34	Popular Photography	420.52	-0.5	10,601,765	10.0
35	Texas Monthly	411.40	-0.9	5,184,107	10.2
36	Skin Diver	410.83	-13.6	4,466,640	-7.9
37	Southern Living	409.49	0.6	24,049,480	12.8
38	Better Homes & Gardens	406.65	-2.0	53,206,493	6.6
39	Architectural Digest	402.01	1.9	11,448,330	5.1
40	Sunset	401.37	-15.8	15,597,578	8.4
41	GQ	398.85	-19.9	12,402,002	-5.8
42	W Magazine	397.75	-2.8	10,738,331	8.5
43	Financial World	385.58	78.0	9,707,017	91.5
44	Money	378.50	0.2	26,013,950	2.3
45	Salt Water Sportsman	378.24	-0.7	2,596,680	-5.3
46	Travel & Leisure	354.80	-19.6	17,596,652	-4.4
47	Car & Driver	350.38	-13.3	15,796,571	-0.5
48	Mademoiselle	342.60	-14.0	13,310,917	-3.4
49	Country Living	341.28	10.6	15,705,374	17.4
50	McCall's	339.80	1.6	26,555,729	0.1
51	Redbook	335.50	-6.7	20,070,787	-17.3
52	Jet	335.46	0.3	6,030,802	2.5
53	Gourmet	334.38	-3.4	10,204,230	-3.0
54	Conde Nast Traveler	329.26	7.8	9,929,609	10.0
55	Inc.	323.30	16.6	13,503,976	8.1
56	Road & Track	313.94	-7.8	10,293,362	2.4
57	Seventeen	306.66	-10.0	10,389,626	-9.2
58	Black Enterprise	306.37	19.7	4,931,845	32.6
59	Ebony	303.37	-6.0	11,670,232	-4.9
60	Outside Magazine	302.70	12.0	6,950,896	35.6
61	Harper's Bazaar	301.14	-20.1	9,092,110	-16.3
62	Parenting	294.88	22.8	7,844,322	42.5
63	Bicycling	288.76	-15.3	5,150,729	-1.3
64	Self	285.06	-4.5	12,185,670	-1.2
65	Delta Sky	283.31	9.9	8,648,395	17.2
66	Ski	282.97	-6.2	6,064,852	2.1
67	Parade*	280.89	11.3	147,770,102	13.9
68	Esquire	279.52	3.6	9,915,433	17.3
69	Bassmaster	275.61	-11.3	5,925,131	-7.3
70	Reader's Digest	273.76	-6.7	34,132,184	9.8
71	Bon Appetit	269.16	-12.4	9,536,749	-1.0
72	Skiing	267.99	16.7	5,580,164	19.0
73	Four Wheeler	265.83	-10.0	2,178,103	-19.7
74	Mirabella	264.83	-18.0	7,735,886	23.1
75	San Francisco Focus	260.12	0.4	1,848,949	3.3
76	Shape Magazine	259.36	21.3	4,754,984	27.2
77	Metropolitan Home	258.36	-10.0	9,575,479	-7.5
78	USA Weekend*	252.14	18.4	56,808,427	39.7
79	Sports Afield	250.78	-6.9	5,217,102	-4.5
80	Automobile Magazine	250.60	-2.7	6,972,818	3.8
81	Entertainment Weekly	248.15	2.7	7,745,187	41.3
82	Field & Stream	246.70	-7.1	10,930,475	-10.8
83	Omni	241.42	5.2	6,454,675	5.1
84	Smithsonian	241.06	-17.3	11,540,365	-9.1
85	Motor Trend	240.27	-13.4	10,647,680	0.3
86	Essence	236.70	3.2	7,661,197	19.9
87	Penthouse	236.33	2.4	9,422,413	2.1
88	Tennis	234.85	3.5	8,277,926	7.6
89	House Beautiful	230.80	2.6	9,052,528	0.5
90	Kiplinger's Personal Finance	230.54	19.6	6,706,217	20.5
91	Compute	229.23	-17.8	1,998,482	-18.3
92	New Woman	226.81	-12.1	6,142,376	-15.0
93	Working Women	226.72	-19.8	8,026,087	-11.8
94	Northwest Air World Traveler	226.33	38.4	4,361,437	4.7
95	Outdoor Life	225.94	-13.8	7,368,020	-14.8
96	HG	224.96	-22.5	6,663,301	-14.2
97	Yankee	222.88	-4.4	2,371,797	-25.3
98	Popular Science	212.65	-0.4	7,828,942	15.7
99	Premiere	211.49	-8.1	4,439,208	-2.1
100	Popular Mechanics	210.36	-11.3	8,688,308	2.6

Percent change compares January April in 1992 with 1991. *National Sunday magazine tracked separately by PIB. Source: Publishers Information Bureau

Army base for media service

First concerted national sales effort for military guides

By Bradley Johnson

Targeted Media Services boasts a new base rate for military publications.

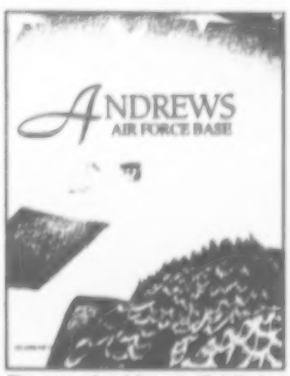
The new media service will sell national ad space in the official annual guides distributed on major military bases in the U.S.

Targeted Media claims to offer the only national advertising authorized and distributed by the military.

The Alexandria, Va.-based company was started this year by Michael Martella, president of Marcoa Publishing, which produces guides for 145 of the 175 major active-duty military installations in the U.S.

The annual guidebooks—including a phone book, Yellow Pages directory and detailed information about the base—are distributed to new arrivals and base residents. The military provides editorial. Publisher contracts run up to six years.

Marcoa last year bought its major competitor, Blake Publishing Co., from Southwestern Bell Corp. Smaller companies publish the remaining guides.



The annual guides are distributed on 175 military bases.

Targeted Media has contracts with most of those publishers to handle national ad sales, Mr. Martella said.

The company will charge $373,500 for a b&w or color page ad in all books, based on distribution of 1.5 million and a cost per thousand of $249.

U.S. military cutbacks are expected to reduce the number of military personnel worldwide 25% by late in the decade. However, the military's employment will remain flat or increase in the U.S., where Targeted Media sells ads, Mr. Martella said.

National advertisers can also reach the U.S. military through a host of independent publications. Army Times Publishing Co. publishes three weekly newspapers, *Army Times, Air Force Times* and *Navy Times*; other companies offer network buys for local weekly base papers.

The annual guidebooks get good readership because military personnel move so frequently and rely on the guides to orient themselves in their new homes, Mr. Martella said. □

Joe Mandese coordinates MediaWorks.

CONSUMER MAGAZINE AD LINAGE

	April 1992	April 1991	Year-to-date 1992	Year-to-date 1991
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	133.5	162.0	493.8	468.6
Automobile Magazine C.	84.1	88.8	250.6	257.6
Car & Driver C.	108.2	131.9	350.4	404.2
Car Collector & Car Classics	43.0	17.0	128.0	79.0
Car Craft	71.1	63.2	197.6	208.2
Circle Track	93.6	76.7	356.6	332.2
Cycle World	89.2	45.7	239.6	161.2
Dirt Rider	57.3	45.9	177.5	151.3
Dune Buggies & Hot VWs	74.7	63.0	310.3	265.3
Easyriders	46.2	45.6	162.7	157.4
Family Motor Coaching	160.5	159.3	598.6	660.6
Four Wheeler C.	72.7	79.0	265.8	295.2
Hot Rod C.	63.3	67.4	193.8	226.5
Motorcyclist	67.3	63.8	173.8	169.7
Motor Trend C.	69.8	71.8	240.3	277.5
Motorhome	77.8	81.6	278.4	321.6
Petersen's 4 Wheel	71.6	77.5	242.5	247.6
Rider	61.1	52.5	158.2	93.2
Road & Track C.	108.1	99.0	313.9	340.6
Trailer Life	82.7	82.6	280.2	318.2
Total Group	**1,635.8**	**1,574.2**	**5,512.5**	**5,435.7**
% change	**3.9%**		**1.4%**	
■ Boating & yachting				
Boating	141.4	99.7	538.5	408.2
Chesapeake Bay	34.5	33.7	108.8	112.4
Cruising World	110.2	136.7	345.4	431.8
Lakeland Boating (11X)	81.1	75.5	271.7	271.0
Motor Boating & Sailing	137.6	117.4	342.1	393.3
Sail	141.0	112.6	457.5	415.0
Sailing World	57.0	70.5	156.3	211.9
Trailer Boats (11X)	70.7	54.8	249.8	231.7
Yachting C.	118.6	102.6	515.7	468.0
Total Group	**892.1**	**803.5**	**2,985.7**	**2,943.3**
% change	**11.0%**		**1.4%**	
■ Civic/fraternal				
Elk (10X)	15.2	14.2	68.9	63.3
Kiwanis (10X)	19.3	16.8	73.0	68.2
Lion (10X)	5.8	12.7	18.2	29.7
Rotarian	14.0	15.2	64.6	70.4
V.F.W. (11X)	27.0	28.6	100.6	111.7
Total Group	**81.3**	**87.5**	**325.3**	**343.3**
% change	**-7.1%**		**-5.2%**	
■ General				
American Health (10X) C.	33.0	26.8	151.0	88.5
American Heritage (8X) C.	34.6	67.8	71.6	123.5
American Legion	32.3	33.1	142.3	141.6
Archaeology (6X)	—	—	53.9	65.4
Art & Antiques (10X) C.	33.8	59.3	161.0	250.6
ARTnews (10X)	60.8	98.2	264.8	358.5
The Atlantic C.	52.1	45.8	209.1	195.5
Bon Appetit C.	74.3	82.3	269.2	307.3
Buena Salud	23.2	35.5	78.4	108.5
Cable Guide & TV Time C.	25.3	27.0	99.2	105.5
Caribbean Travel & Life (6X) A.	—	—	112.7	102.0
Conde Nast Traveler C.	95.4	82.5	329.3	305.4
Consumers Digest (6X) C.	—	—	57.7	47.9
Cooking Light (7X) C.	—	—	117.8	125.2
Country America (10X) C.	38.5	38.9	152.8	139.4
Departures N. America (6X)	40.8	57.1	82.1	136.9
Ebony C.	68.6	71.4	303.4	322.8
Endless Vacation (8X) C.	29.0	19.9	111.9	82.0
European Travel & Life (10X) C.	39.5	34.7	122.7	165.5
Food & Wine C.	47.8	41.3	176.1	174.9
Golden Years (6X)	—	—	68.4	64.1
Gourmet C.	114.5	102.0	334.4	346.2
Harper's Magazine C.	28.6	34.8	116.5	125.7
Islands (6X) C.	—	—	149.2	145.4
Kiplingers Personal Finance C.	65.4	47.1	230.5	192.8
Let's Live	44.0	40.0	159.0	177.0
Life C.	36.4	37.5	147.2	156.3
Longevity C.	44.3	41.7	200.6	166.7
Mature Outlook (6X) C.	—	—	84.9	84.3
Modern Maturity (6X) C.	31.5	32.0	68.8	69.0
Money C.	111.2	97.5	378.5	377.6
National Geographic C.	18.1	37.7	73.2	98.3
National Geographic Traveler (6X) C.	—	—	107.8	98.3
Natural History C.	27.4	37.3	113.8	140.3
New Choices (10X) C.	31.9	26.1	92.5	104.0
Prevention C.	50.8	35.5	176.3	157.0
Reader's Digest C.	81.6	83.8	273.8	293.4
Sat. Evening Post (9X) C.	—	31.2	70.9	104.1
Smithsonian C.	66.9	83.8	241.1	291.6
Town & Country C.	63.6	87.9	203.7	292.5
Travel-Holiday (10X) C.	51.3	53.7	180.4	176.7
Travel & Leisure C.	103.8	118.3	354.8	442.4
Travelhost	110.8	113.0	467.7	470.5
US Magazine C.	32.0	44.1	108.2	131.4
Utne Reader (6X)	—	—	117.0	93.8
Vanity Fair C.	154.8	140.6	424.4	376.3
The Walking Mag. (6X) C.	46.6	39.8	70.1	68.6
Yankee C.	61.3	66.7	222.9	233.1
Total Group	**2,105.5**	**2,253.2**	**8,303.5**	**8,824.2**
% change	**-6.6%**		**-5.9%**	
■ Home				
Architectural Digest C.	126.5	113.1	402.0	394.7
Better Homes & Gardens C.	127.9	119.8	406.7	415.0
Colonial Homes (6X) C.	52.7	62.7	93.4	96.8
Columbus Monthly-Homes (4X)	20.2	18.5	35.5	39.1
Country Home (6X) C.	80.9	69.5	124.0	109.6
Country Life (6X)	—	—	72.8	109.8
Country Living C.	124.8	85.6	341.3	308.6
Decorating Remodeling (8X) C.	49.6	51.9	94.9	96.3
Family Handyman (10X) C.	46.6	52.1	153.2	176.2
Flower & Garden (6X)	—	—	78.5	59.7
HG C.	71.3	97.2	225.0	290.4
Home C.	78.1	54.0	201.1	198.1
Home Mechanix (10X) C.	42.1	57.7	104.2	124.4
Horticulture (10X)	54.3	60.0	191.0	188.5
House Beautiful C.	68.7	65.9	230.8	225.0
Metropolis (10X)	40.2	39.6	137.7	149.4
Metropolitan Home C.	91.0	115.2	258.4	287.0
Midwest Living (6X) C.	115.0	93.3	173.9	143.9
Organic Gardening (9X) C.	44.3	54.0	183.1	208.0
Phoenix Home/Garden	47.8	46.0	222.5	207.6
Practical Home-owner (9X) C.	58.3	49.2	58.3	193.7
San Diego Home/Garden	55.9	70.9	202.3	241.9
Southern Accents (10X) C.	52.0	48.9	143.7	137.8
Southern Living C.	129.1	136.5	409.5	406.9
Sunset Magazine C.	115.7	150.4	401.4	476.7
Traditional Home (6X) C.	—	29.7	62.5	48.0
Workbench (6X)	—	—	83.8	93.3
Total Group	**1,693.0**	**1,741.8**	**5,091.3**	**5,426.3**
% change	**-2.8%**		**-6.2%**	
■ In-flight & other passenger				
Aboard Group (6X)	—	—	95.2	73.4
Alaska Airlines	42.2	50.1	177.5	205.8
America West Airlines	52.2	58.3	211.0	268.0
American Way (24X) C.	140.7	115.7	527.4	465.8
Delta Sky C.	79.5	64.8	283.3	257.8
Northwest Air World Traveler C.	58.7	41.3	226.3	163.5
Spirit of Aloha	39.5	31.4	143.4	171.3
TWA Ambassador A.	44.1	39.0	153.6	143.4
United Vis 'A Vis	80.9	61.8	264.9	271.0
US Air Magazine	79.7	62.9	286.2	259.3
Total Group	**617.5**	**525.3**	**2,368.9**	**2,279.3**
% change	**17.6%**		**3.9%**	
■ Men's				
Details	43.5	35.2	135.4	98.2
Esquire C.	90.9	76.7	279.5	269.9
Firehouse Magazine	48.2	33.1	155.3	147.7
Gentlemen's Quarterly C.	126.6	141.9	398.9	497.8
M Magazine C.	40.6	44.2	192.3	196.7
Men's Fitness	41.7	31.3	153.5	129.9
Men's Health (6X)	—	—	42.0	48.7
Muscle & Fitness C.	121.7	125.7	475.9	479.3
Penthouse C.	55.5	52.9	236.3	230.8
Playboy C.	50.9	57.3	186.8	230.1
Popular Mechanics C.	76.0	80.0	210.4	237.3
Total Group	**695.6**	**678.1**	**2,466.2**	**2,566.3**
% change	**2.6%**		**-3.9%**	
■ Metropolitan				
Aloha (6X)	—	—	63.8	73.0
Annapolitan (10X) A.	33.1	39.3	97.9	175.5
Atlanta	65.6	66.4	221.8	250.6
Baltimore	43.2	62.9	136.7	181.6
Boston	71.5	78.5	264.6	295.4
Chicago	79.0	76.7	245.5	271.7
Chicago's North Shore	87.0	72.7	299.2	291.5
Cincinnati	48.9	40.6	135.1	134.2
Cleveland	91.0	65.2	232.4	155.9
Columbus Monthly	49.3	50.3	146.0	163.9
Connecticut	57.8	58.9	224.8	222.1
D/Magazine	46.3	52.4	164.0	186.0
Detroit Monthly	64.9	50.7	216.9	173.5
Diablo	73.7	54.3	219.6	210.1
Grand Rapids	22.7	22.3	68.0	89.9
Honolulu	38.9	47.1	142.5	174.2
Houston Metropolitan Mag.	69.7	107.3	246.4	273.8
L.A. Style	42.8	94.8	106.4	284.4
Los Angeles	90.0	86.1	312.8	334.9
Louisiana Life (6X)	20.6	31.5	41.3	54.1
Louisville	85.7	106.9	171.7	199.7
Madison	56.0	36.0	160.0	127.0
Memphis	37.5	57.3	132.7	185.7
Mid Atlantic Country	82.2	74.2	212.5	201.2
Milwaukee	36.8	53.2	199.7	266.3
Minneapolis/St. Paul	106.2	77.9	373.1	327.8
Minnesota Monthly Mag.	73.1	57.4	233.9	196.6
New Jersey Monthly	54.5	41.1	195.2	170.8
New Mexico	43.8	38.8	188.3	182.5
Ohio	38.1	36.8	144.0	155.8
Orlando	49.3	103.9	216.4	372.9
Pacific Northwest (9X) A.	43.1	36.3	136.8	116.3
Palm Springs Life	82.2	92.8	544.0	549.8
Philadelphia	95.5	117.8	331.1	409.1
Phoenix	36.3	29.1	141.1	114.6
Pittsburgh	62.5	63.2	230.5	246.5
Rhode Island Monthly	32.6	34.2	125.7	153.7
Sacramento Magazine	31.3	49.0	158.0	202.7
San Diego	84.5	95.4	301.5	359.2
San Francisco Focus C.	74.2	73.9	260.1	259.0
Sarasota (10X)	80.6	55.5	310.5	299.5
South Florida Magazine	55.8	54.6	219.8	218.8
St. Louis	26.7	35.3	108.2	139.3
Texas Monthly C.	124.1	117.4	411.4	415.2
The Washingtonian	85.6	96.4	306.2	375.8
Total Group	**2,674.3**	**2,802.4**	**9,396.1**	**10,242.1**
% change	**-4.6%**		**-8.2%**	
■ Music/entertainment				
Audio	56.0	72.1	265.2	297.6
Dance Magazine	60.9	57.3	253.4	253.7
Entertainment Weekly (52X) C.	70.2	56.1	248.2	241.6
Playbill	38.4	42.3	144.6	150.5
Premiere C.	84.4	75.2	211.5	230.2
Rolling Stone (25X) C.	175.6	186.9	461.0	486.0
Spin C.	67.6	57.4	181.7	162.2
Video Magazine	58.5	63.2	281.5	266.1
Total Group	**611.5**	**610.3**	**2,047.0**	**2,087.9**
% change	**0.2%**		**-2.0%**	
■ Outdoor & sport				
Alaska	41.8	46.5	164.0	187.6
The American Handgunner (6X)	—	—	132.0	103.0
American Hunter	19.2	12.3	65.2	59.8
American Rifleman	20.0	20.1	76.2	78.9
Audubon (6X) C.	—	—	73.1	89.7
Backpacker (8X) C.	66.0	53.8	88.6	76.0
B.A.S.S. Times	28.1	14.6	89.3	65.0
Bassmaster (10X) C.	75.7	52.5	275.6	310.8
Bicycling (10X) C.	110.8	138.2	288.8	341.0
Ducks Unlimited (6X)	—	—	47.0	54.9
Field & Stream C.	76.3	71.1	246.7	265.5
Fishing World (6X)	—	—	78.4	71.2
Flex	91.3	82.5	365.8	293.7
Florida Sportsman	120.3	121.4	476.7	487.0
Golf Digest C.	147.2	118.5	486.5	401.2
Golf Magazine C.	103.7	97.3	446.0	464.9
Guns	47.0	31.0	173.0	139.0
Guns & Ammo	39.3	38.8	151.3	139.4
In-Fisherman (7X)	72.0	75.5	280.0	263.0
Outdoor Life C.	63.8	77.9	225.9	262.2
Outside Magazine C.	104.4	102.4	302.7	270.2
Petersen's Hunting	37.8	37.2	137.2	141.0
Runner's World C.	61.0	54.9	198.9	198.8
Salt Water Sportsman C.	87.1	78.2	378.2	380.8
Shooting Times	36.9	23.8	137.9	102.4
Sierra (6X) C.	—	—	81.0	86.0
Ski (8X) C.	36.3	53.0	283.0	301.6
Skiing (7X) C.	—	—	268.0	229.6
Skin Diver C.	111.2	131.3	410.8	475.3
Southern Outdoors (9X)	52.5	45.2	204.9	172.9
Southern/Western Links (6X)	46.2	39.7	162.8	112.4
Sport Magazine C.	24.7	28.9	98.7	133.3
Sports Afield C.	72.7	76.6	250.8	269.3
Surfing	56.7	59.7	189.5	222.4
Tennis C.	85.1	74.5	234.9	226.9
Volleyball A.	30.5	—	92.1	52.9
Waterski (10X)	76.4	60.8	253.5	244.0
Western Outdoors (9X)	28.2	24.0	103.9	98.3
Wind Surfing (8X)	65.5	65.7	144.4	117.4
Total Group	**2,135.6**	**2,007.6**	**8,163.1**	**8,058.5**
% change	**6.4%**		**1.3%**	
■ Photography				
American Photo (6X) C.	—	—	87.7	86.1
Outdoor Photographer (10X)	42.3	31.3	98.6	92.5
Petersen's Photographic	49.0	37.8	194.7	114.7
Popular Photography C.	110.6	106.9	420.5	422.7
Shutterbug	174.0	174.0	695.0	677.0
Total Group	**375.9**	**350.0**	**1,496,5**	**1,393.0**
% change	**7.4%**		**7.4%**	
■ Science/electronic/mech				
Compute C.	76.0	63.7	229.2	279.0
Discover A. C.	19.3	40.4	84.9	134.1
Home Office Computing C.	55.4	36.3	180.8	157.6
Omni C.	59.1	52.2	241.4	229.5
Popular Science C.	57.2	65.4	212.7	213.5
Scientific American C.	66.7	79.0	193.0	218.0
Spectrum C.	42.7	46.0	163.1	185.1
Total Group	**376.4**	**383.0**	**1,305.2**	**1,416.8**
% change	**-1.7%**		**-7.9%**	
■ Woman/fashion/service				
Allure C.	46.2	27.0	153.2	98.7
Bride's Magazine (6X) C.	427.2	443.7	1,270.2	1,251.5
Child (10X) C.	62.9	63.4	191.3	176.7
Cosmopolitan C.	200.6	180.4	587.2	622.7
Elegant Bride (6X)	309.2	120.7	642.3	359.6
Elle C.	166.4	158.7	490.1	553.6
Essence C.	67.4	64.8	236.7	229.4
Family Circle (17X) C.	170.8	167.7	528.4	515.2
Glamour C.	184.3	206.6	469.8	567.9
Good Housekeeping C.	138.3	146.3	510.2	526.9
Harper's Bazaar C.	84.7	98.2	301.1	376.9
Imagen	108.2	89.9	239.6	293.7
Ladies' Home Journal C.	116.4	138.8	421.9	497.5
Lear's C.	40.6	48.4	153.3	166.5
Mademoiselle C.	134.1	138.4	342.6	398.4
McCall's C.	93.5	80.2	339.8	334.4
Military Lifestyle A.	54.8	38.7	176.9	145.6
Mirabella C.	71.6	94.4	264.8	323.1
Modern Bride (6X) C.	388.5	380.6	1,041.8	1,007.9
New Woman C.	80.1	68.4	226.8	258.1
Parenting C.	108.3	77.5	294.9	240.1
Parents Magazine C.	141.5	121.9	431.9	445.3
Redbook C.	86.5	101.0	335.5	359.5
Sassy C.	39.3	39.1	151.1	132.1
Self C.	100.3	98.7	285.1	298.4
Seventeen C.	100.2	105.3	306.7	340.7
Shape C.	74.9	62.7	259.4	213.8
Soap Opera Digest (26X) C.	31.7	35.8	145.4	143.5
Teen Magazine	49.6	44.5	170.5	162.0
True Story C.	39.5	43.2	163.1	162.1
Victoria C.	40.1	51.1	147.1	173.5
Vogue C.	380.1	231.5	906.3	885.1
W Magazine (26X) C.	65.1	65.4	397.8	409.1
Weddings West (4X) A.	—	—	288.0	42.3
Weight Watchers C.	31.2	29.0	121.7	137.1
Woman's Day (15X) C.	169.0	104.6	451.6	307.6
Workbasket (6X)	—	—	73.3	55.2
Working Mother C.	60.8	60.3	191.4	224.3
Working Woman C.	63.0	68.9	226.7	282.9
YM-Young & Modern (10X)	50.4	43.7	140.9	133.5
Total Group	**4,557.2**	**4,139.5**	**14,076.0**	**13,852.3**
% change	**10.1%**		**1.6%**	
■ Youth				
Boys' Life C.	12.1	18.7	58.8	64.0
Campus Life (10X)	31.7	41.0	206.3	206.7
Total Group	**43.8**	**59.7**	**265.1**	**270.7**
% change	**-26.6%**		**-2.1%**	
■ Business/national				
Barron's	144.3	162.5	534.0	515.9
Black Enterprise C.	68.1	40.3	306.4	256.0
Business Week (52X) C.	337.7	316.7	1,065.2	951.0
Economist (52X) C.	215.5	194.4	887.3	735.3
Entrepreneur C.	175.4	168.0	728.0	703.6
Entrepreneurial Woman (7X) C.	36.2	38.7	111.5	123.6
Financial World (26X) C.	77.7	46.9	385.6	216.7
Forbes (26X) C.	292.8	270.6	977.9	920.1
Fortune (26X) C.	276.4	296.1	728.2	704.8
Frequent Flyer	28.3	34.8	108.8	144.1
Futures	34.5	50.2	143.3	160.4
Harvard Business Review (6X) C.	—	—	81.7	102.7
Inc. Magazine C.	92.9	75.4	323.3	272.7
Income Opportunities	67.2	65.4	249.3	304.2
Industry Week (23X)	71.9	78.2	243.2	270.4
Nation's Business C.	28.6	23.8	101.2	103.0
Success C.	38.3	31.1	110.4	142.9
Total Group	**1,985.7**	**1,893.1**	**7,085.2**	**6,627.3***
% change	**4.9%**		**6.9%**	
■ Business/regional				
Business Atlanta	30.3	48.2	116.0	120.2
Bus. First-Columbus (52X)	114.8	95.7	405.1	351.2
Bus. Jrnl.-Milwaukee (52X)	107.6	136.7	429.3	465.4
Bus. Jrnl.-Sacramento (52X)	72.8	97.6	280.7	304.2
Bus. North Carolina	26.0	34.7	97.3	117.3
Capital Dist. Bus. Review (52X)	82.9	111.0	293.4	296.2
Caribbean Business	115.5	86.9	342.0	339.5
Corporate Rpt. Minnesota	42.5	53.1	165.9	186.2
Crain's Chicago Bus. (52X)	124.5	150.7	399.8	389.4
Crain's Cleveland Bus. (52X)	58.3	101.0	219.1	245.9
Crain's Detroit Bus. (52X)	62.3	74.8	251.8	258.3
Crain's New York Bus. (52X)	73.0	89.0	253.0	226.0
Florida Trend (12X)	61.2	55.5	145.4	143.3
Georgia Trend	47.3	48.7	133.3	148.0
Grand Rapids Bus. Jrnl.	57.9	64.5	207.3	208.4
Hawaii Business	46.0	52.2	186.8	191.9
Houston Bus. Jrnl. (52X)	123.4	161.9	538.4	444.0
Indianapolis Bus. Jrnl. (52X)	116.7	160.8	445.5	469.0
Nashville Business & Lifestyle	16.2	21.1	51.8	80.8
New Orleans City Business (52X) A.	78.3	43.4	237.1	178.6
Pacific Bus. News (52X)	101.4	118.4	413.7	394.0
Philadelphia Bus. Jrnl (52X)	113.5	129.0	407.8	347.2
Providence Business News	54.8	70.5	222.4	244.0
Warfield's Business Record-Maryland (52X) B.	42.2	—	135.9	—
Total Group	**1,727.1**	**2,005.2**	**6,243.1**	**6,149.0**
% change	**-13.9%**		**1.5%**	
■ National Sunday mags				
Parade (52X) C.	64.8	55.8	280.9	252.4
USA Weekend (52X) C.	64.3	62.6	252.1	212.9
Vista Magazine (12X)	13.8	12.6	54.4	52.3
Total Group	**142.8**	**131.1**	**587.4**	**517.6**
% change	**8.9%**		**13.5%**	
■ Newspaper Sunday magazine				
Boston Globe	112.3	114.5	474.9	479.1
Chicago Tribune	97.3	156.2	455.0	375.3
Cleveland Plain Dealer	50.7	69.3	158.0	160.7
The Dallas Morning News	52.3	60.4	182.3	180.5
Detroit Free Press	21.0	66.0	84.0	156.0
L.A. Times C.	98.1	136.8	389.3	242.3
New York Times Mag. C.	243.9	287.6	921.2	967.3
Seattle Times	57.0	60.0	221.0	228.0
St. Louis Post Dispatch	84.3	102.8	281.5	310.0
Washington Post	64.4	88.7	265.7	323.9
Total Group	**881.3**	**1,142.3**	**3,432.9**	**3,423.1**
% change	**-22.8%**		**0.3%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	170.3	204.3	582.0	718.8
Army Times Military Group:				
Air Force Times (52X)	125.7	163.4	500.3	531.3
Army Times (52X)	124.9	155.5	491.7	519.9
Navy Times (52X)	136.1	166.7	534.3	561.8
Capper's (26X)	24.1	27.9	136.7	123.4
Commonweal (22X)	11.5	7.5	35.4	33.6
Golf World (41X) C.	214.0	188.4	692.0	616.5
Grit (52X)	24.0	31.2	125.4	151.0
Jet (52X) C.	88.5	77.0	335.5	334.5
National Journal (50X) C.	30.0	47.5	142.0	203.8
National Review (25X)	34.2	33.5	152.9	130.5
New Republic (48X)	41.1	47.0	161.6	160.1
New York Mag. (50X) C.	184.3	181.2	676.1	666.5
New Yorker C.	158.2	155.1	535.8	502.4
Newsweek (52X) C.	161.2	131.5	598.2	529.4
People (51X) C.	267.6	246.7	865.1	959.4
Sporting News (52X) C.	42.2	29.7	152.6	135.0
Sports Illustrated (52X) C.	187.2	193.7	699.9	676.3
Time (52X) C.	175.9	173.5	619.6	656.3
TV Guide (52X) C.	170.2	178.4	804.5	831.9
U.S. News & World Report (50X) C.	174.6	150.9	565.3	517.2
Total Group	**2,545.7**	**2,590.6**	**9,406.8**	**9,559.6**
% change	**-1.7%**		**-1.6%**	

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. Sectional linage is prorated to circulation of regional editions. A. Frequency change from prior year. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Kathy Welyki.